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ABSTRACT

This set of 3 modules on communications is 1 of 11 sets in the Health Occupations Education I instructional package for the first year of a 2-year course of study. The materials are designed to prepare students through individualized instruction for entry-level job opportunities on health care teams in a variety of practice settings. Each module may contain some or all of the following components: introduction, directions with materials needed to complete the module, objective, learning activities, student information, student self-check, check-out activities, and evaluator's final checklist to rate student performance. Modules cover these tasks: screening incoming calls, recording and relaying messages, and placing outgoing calls; greeting and directing visitors; and initiating and responding to intercom communications. (YLB)

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HEALTH OCCUPATIONS EDUCATION I

MODULE NO. VII-A to VII-C

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SCREENING INCOMING CALLS, RECORDING AND RELAYING MESSAGES, AND PLACING OUTGOING CALLS

INTRODUCTION

The telephone is one of the most important means of communication for the nursing assistant. The nursing assistant is frequently called upon to answer incoming calls and place outgoing calls for patients. The impression you give over the phone reflects your institution either positively or negatively. The tasks of screening incoming calls, recording and relaying messages, and placing outgoing calls will be examined in this module.

DIRECTIONS

In order to complete this module you will need a telephone, a pen, paper, and a simulated patient.

Read the objective. If you think you are already able to perform this task, read the Check-Out Activity. Then either arrange with your evaluator to do the Check-Out Activities,

or

If you need to complete learning activities in order to be able to do the tasks, find the Learning Activities and go through them in the order in which they are listed.

OBJECTIVES

1. Given three incoming calls, a pen, and paper, accept the calls, record the message, and relay the messages accurately.

2. Provided a bed patient and a telephone, assist the patient in placing a personal call. The correct party must be reached.

LEARNING ACTIVITIES

1. READ Student Information, TELEPHONE COMMUNICATIONS, to learn about screening calls, recording and relaying messages, and placing calls.

   (and/or) _____

2. PRACTICE screening incoming calls, recording and relaying messages, and placing outgoing calls with a Teletrainer which is available from your local Bell Telephone Company.

   (and/or) _____

3. COMPLETE Student Self-Check, TELEPHONE COMMUNICATIONS.

4. ARRANGE with your evaluator to complete this module by going through the Check-Out Activities.

STUDENT INFORMATION

Telephone Communications

Important information is transmitted over the telephone daily. When answering or making calls, remember:

1. Identify yourself by name, job title, and location; for example, "Fourth surgical, Ms. Smith, Nursing Assistant."

2. Speak distinctly and courteously; for example, "May I help you?" Avoid slang and irritating noises such as pencil tapping or gum chewing.

3. Be prepared to write down information or take messages. Have pencil and paper available. Write down the information and read it back to check the accuracy of the message. For example, "You would like Ms. Jones to call the lab, extension 4342." Relay messages as soon as possible.

4. Restrict calls to business matters, not personal ones. Offer to take messages for others. Suggest that the calling party call after working hours, if possible.

5. Allow the person who has called to hang up first.

6. Do not place callers on "hold" unless necessary. When necessary, check back every minute to reassure the caller that he/she has not been forgotten or disconnected.

7. Information about patients is confidential; refer all inquiry calls to the nurse. For example, "If you will hold, I will get Nurse Jones for you." Nonpersonal information such as room number or time of surgery may be transmitted. To avoid possible legal action, refrain from giving any information which may be considered personal.

8. Become familiar with your institution's procedure for transferring calls to another number.

When assisting patients in placing telephone calls, follow these guidelines:

1. Inform the patient that you would like to assist in placing the call.

2. Place the patient in a comfortable position.

3. Obtain the number of the party the patient wishes to call.

4. Dial the number correctly.

5. Identify yourself when the party answers.

6. Give phone to the patient.

7. Place call button within easy reach of the patient.

8. Leave the patient to converse in privacy.

9. Return to assist the patient when signaled.

STUDENT SELF-CHECK

Telephone Communications

Read each statement and select the best answer. Record your answers on a separate sheet of paper. Compare your answers with the key.

1. Dr. Reed calls to leave orders for a patient, Allen Boggs.

   A. Record the information and repeat it to the doctor.
   B. Transfer the call to the patient's room.
   C. Record the information and give it to the nurse.
   D. Call the nurse to the phone.

2. Mr. Williams calls and requests the physical condition of patient, Bob Wilson.

   A. Check the patient's chart and relay the latest condition of the patient to the caller.
   B. Transfer the call to the patient's room.
   C. Call the nurse to the phone.
   D. Call the operator.

3. A caller requests the time of surgery for a patient, Linda Day.

   A. Call the nurse to the phone.
   B. Check patient's chart for time and relay the information to the caller.
   C. Tell caller this information cannot be given over the phone.
   D. Transfer call to patient's room.

4. When recording messages for a nurse,

   A. Repeat the message back to the caller.
   B. Write down the message and repeat it to the caller.
   C. Write down the message and wait for the caller to hang up.
   D. Write down the message and file it.

5. When relaying messages to the nurse,

   A. Tape the message to the nurse's locker.
   B. Record the message on the patient's chart.
   C. Locate the nurse and give the written message as soon as possible.
   D. Call nurse to nursing station immediately for the message.

6. When receiving personal calls,

   A. Accept them if you are not busy.
   B. Ask caller to call after working hours.
   C. Put caller on "hold" if you are busy.
   D. Limit your conversation to 10 minutes.

7. The first step in assisting a patient to call outside on the telephone is:

   A. Obtain the number of the party the patient wishes to call.
   B. Identify yourself.
   C. Inform patient of your desire to assist in placing the call.
   D. Dial the operator.

8. When the patient is talking to the person called,

   A. Stay with the patient until the conversation is completed.
   B. Place the call button within easy reach of the patient, and leave.
   C. Leave the patient and check back every five minutes.
   D. Offer to take notes for the patient.

CHECK-OUT ACTIVITIES

The statements below explain the activities you must be able to complete in order to finish this module. After you go through the activities, your evaluator will rate your performance using the Evaluator's Final Checklist, SCREENING INCOMING CALLS, RECORDING AND RELAYING MESSAGES, AND PLACING OUTGOING CALLS.

You will be given three incoming call situations. Accept the calls, record the messages, and relay the messages.

You will be provided with a bed patient and a telephone. Assist the patient in placing a personal call.

SCREENING INCOMING CALLS, RECORDING AND RELAYING MESSAGES, AND PLACING OUTGOING CALLS

VII-A

Student _____

Date _____

Evaluator's Final Checklist

Check the student's performance in the following elements of screening incoming calls, recording and relaying messages, and placing outgoing calls.
Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and evaluator will discuss this and decide which learning activities must be repeated.

	Student Performance			
	Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
When answering or making calls, the student:				
1. Identified self by name, job title, and location	[ ]	[ ]	[ ]	[ ]
2. Spoke distinctly and courteously	[ ]	[ ]	[ ]	[ ]
3. Wrote down information and read it back accurately	[ ]	[ ]	[ ]	[ ]
4. Relayed message promptly	[ ]	[ ]	[ ]	[ ]
5. Allowed caller to hang up first	[ ]	[ ]	[ ]	[ ]
6. Placed caller on "hold" correctly	[ ]	[ ]	[ ]	[ ]
7. Called nurse to phone when necessary	[ ]	[ ]	[ ]	[ ]
8. Avoided personal calls	[ ]	[ ]	[ ]	[ ]
When assisting in placing outgoing calls, the student:				
1. Informed patient of desire to assist	[ ]	[ ]	[ ]	[ ]
2. Placed patient in a comfortable position	[ ]	[ ]	[ ]	[ ]
3. Obtained the number of the party the patient wishes to call	[ ]	[ ]	[ ]	[ ]
4. Dialed the number correctly	[ ]	[ ]	[ ]	[ ]
5. Identified self when correct party answers	[ ]	[ ]	[ ]	[ ]
6. Gave phone to patient	[ ]	[ ]	[ ]	[ ]
7. Placed call button within easy reach of patient	[ ]	[ ]	[ ]	[ ]
8. Left room	[ ]	[ ]	[ ]	[ ]
9. Returned to assist patient when signaled	[ ]	[ ]	[ ]	[ ]

STUDENT SELF-CHECK KEY

Telephone Communications

1. D
2. C
3. B
4. B
5. C
6. B
7. C
8. B

GREETING AND DIRECTING VISITORS

INTRODUCTION

The nursing assistant is often the first person whom patients, visitors, or professionals meet in a nursing unit. The first contact with you may make a lasting impression. Visitors often request information about a patient's condition, care, or room location. You must be polite and helpful. In this module you will learn how to greet and direct visitors.

DIRECTIONS

Read the objective. If you think that you are already able to perform this task, read the Check-Out Activities. Then either arrange with your evaluator about doing the Check-Out Activities.

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given the necessary information and three persons seeking directions, direct the persons to their desired location. Standard policies must be observed, and the directions given must result in the arrival of the persons at their desired location without undue delay.

LEARNING ACTIVITIES

1. READ Student Information, GREETING AND DIRECTING

VISITORS, to learn about greeting and directing visitors.

(and/or)_____

2. VIEW Trainex filmstrip, "The Volunteer as Receptionist, Escort, and Hostess,"

(and/or)_____

3. PRACTICE greeting and directing visitors in various situations.

(and/or)_____

4. COMPLETE Student Self-Check, CASE STUDIES.

5. ARRANGE with your evaluator to complete this module by going through the Check-Out Activities.

STUDENT INFORMATION

Greeting and Directing Visitors

As a nursing assistant, you will be responsible for greeting and directing visitors who arrive at your station. You must be friendly, pleasant, and considerate of all who visit you, regardless of their attitude. Relay brief, accurate information. Here are some guidelines for greeting and directing visitors.

1. Welcome each visitor warmly; smile and introduce yourself with your name and title.

2. Try to establish the purpose of the visit. This may be determined by asking the visitor if the patient is a friend or relative. Direct any visitor whose purpose seems questionable to a waiting area and contact a nurse.

3. Check for any special restrictions and inform visitors of the restrictions (e.g., isolation, special diet, or limited visiting time).

4. Direct visitors to the location of the patient's room.

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STUDENT SELF-CHECK

Case Studies

In each of the following case studies, select the best alternative for the situation. Record your answers on a separate sheet of paper. Compare your answers with the key.

Case 1

Mrs. Jones in Room 415 has been diagnosed as a diabetic. Her doctor has restricted visitors to family members only. Her best friend has come to visit her and carries a box of chocolates. She is looking for Mrs. Jones' room. What would you do?

A. Tell the friend she may not visit. Deliver the candy to Mrs. Jones' room.

B. Explain to the visitor that the doctor has limited the visiting privilege to family members. Due to the patient's diet, she may not have candy while in the hospital.

C. Permit the visitor ten minutes with Mrs. Jones; ask her not to tell anyone of her visit.

D. Allow the visitor to give the candy to Mrs. Jones and leave quickly.

Case 2

A nineteen-year-old female patient, Hazel Miller, in Room 430 has miscarried as a result of an automobile accident. A visitor with a briefcase in hand asks you for the patient's room number. What would you do?

A. Introduce yourself and direct the visitor to the patient's room.

B. Ask the visitor the purpose of the call. If it is of questionable nature, direct the visitor to the waiting area. Call a nurse.

C. Tell the visitor the patient has miscarried; allow a very brief visit.

D. Since the visitor appears to be a professional, give prompt directions to the patient's room.

Case 3

An elderly lady who is a relative of a patient in Room 518 requests directions to the room. She walks with a cane and appears to have limited vision. She is on the fourth floor and confused about the layout of the facility. What would you do?

A. Tell the visitor where Room 518 is located.

B. Escort the visitor to Room 518.

C. Call a nurse to escort the visitor.

D. Take the visitor to the elevator and tell her to ask someone on the fifth floor for assistance.

CHECK-OUT ACTIVITIES

The statement below explains the activities you must be able to complete in order to finish this module. After you go through the activities, your evaluator will rate your performance using the Evaluator's Final Checklist, GREETING AND DIRECTING VISITORS.

Given the necessary information and three persons seeking directions, greet and direct them to their desired location.

GREETING AND DIRECTING VISITORS

Student _____

Date _____

Evaluator's Final Checklist

Check the student's performance in the following elements of greeting and directing visitors.

Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and evaluator will discuss this and decide which learning activities must be repeated.

	Student Performance			
	Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
When greeting and directing visitors, the student:				
1. Welcomed each visitor warmly	[ ]	[ ]	[ ]	[ ]
2. Directed visitor to desired location without undue delay	[ ]	[ ]	[ ]	[ ]

STUDENT SELF-CHECK KEY

Case Studies

1. B
2. B
3. B

INITIATING AND RESPONDING TO INTERCOM COMMUNICATIONS

INTRODUCTION

One of the most effective communication devices available for patients and nursing personnel is the intercom system. The intercom connects the patient's room with the nurses' station. It can also be used as a paging system to locate personnel on the nursing unit. The intercom system allows direct voice contact between the patient's room and the health assistant who can inform the nurses of the patient's need if it is one that he/she cannot handle alone. Intercom communications save time and energy for the nurse and the nursing assistant. They can also help patients in emergency situations. In this module you will learn how to initiate and respond to intercom messages.

DIRECTIONS

In order to complete this module you will need an intercom system (or simulated system), pen, and paper.

Before you start to work on this module, be sure you have completed the module entitled, "Screening Incoming Calls, Recording and Relaying Messages, and Placing Outgoing Calls."

Read the objective. If you think that you are already able to perform this task, read the Check-Out Activities. Then either arrange with your evaluator about doing the Check-Out Activities.

or

If you need to complete learning activities in order to be able to do the task, find the Learning Activities inside this module and go through them in the order in which they are listed.

OBJECTIVE

Given situations to use the intercom, answer the intercom twice. The intercom must be answered promptly and distinctly, and the message must be heard in the appropriate location.

LEARNING ACTIVITIES

1. READ Student Information, INTERCOM COMMUNICATION GUIDELINES, to learn about initiating and responding to intercom communications.

   (and/or)_____

2. PRACTICE initiating and responding to intercom communications.

   (and/or)_____

3. COMPLETE Student Self-Check, INTERCOM COMMUNICATION.

4. ARRANGE with your evaluator to complete this module by going through the Check-Out Activities.

STUDENT INFORMATION

Intercom Communication Guidelines

Intercom systems vary from institution to institution; however, the following guidelines may be applied to any system:

1. Answer the intercom promptly. Ask the patient, "May I help you?" If you receive no reply, repeat, "May I help you?" If there is still no reply, go to the patient's room immediately to check on the patient.

2. Listen to what the patient tells you. If the patient asks for a nurse, try to determine the patient's need. If you can assist, do so quickly. If you are unable to handle the request (such as requests for medicine), notify a nurse as soon as possible. It may be necessary to page the nurse.

3. When paging personnel or giving messages over the intercom, do so only if you cannot locate the person whose assistance is needed immediately. People who are often paged include doctors, nurses, supervisors, and social workers.

4. Before you speak, remember:

   a. Do not give personal messages over the page.
   b. Speak distinctly and use titles. For example, "Dr. Smith, please call the desk, " not "John, call the desk."
   c. All background noises surrounding the intercom can be heard on the page.

STUDENT SELF-CHECK

Intercom Communication

Read each statement and select the best answer. Record your answers on a separate sheet of paper. Compare your answers with the key.

1. The patient in Room 412 calls over the intercom and you answer. The patient wants to see a nurse. What would you do?

   A. Locate the nurse and tell him/her to go to Room 412.
   B. Tell the patient the nurse is not available but that you will relay the message.
   C. Ask the patient what is needed and assist if possible.
   D. Tell the patient the nurse is not available; ask the patient to call back in a few minutes.

2. The intercom light comes on from Room 317. When you answer the intercom, you receive no response from the patient. What would you do?

   A. Call a repairperson to check the light.
   B. Turn off the intercom; the patient must have accidentally depressed it.
   C. Page the nurse to go to the patient's room immediately.
   D. Go to Room 317 and check on the patient immediately.

3. The patient in Room 329 calls and requests a pain shot. The location of the nurse is not known. What would you do?

   A. Tell the patient to wait; a nurse should return in a few minutes.
   B. Try to locate the nurse; if unsuccessful, page nurse to call the nurses' station.
   C. Page and tell the nurse that the patient in Room 329 needs a pain shot.
   D. Take the message and read it back to the patient; leave it at the nurses' station.

4. Nurse Kelly's husband calls and asks you to tell Nurse Kelly that he will be unable to pick her up after work. What would you do?

   A. Page Nurse Kelly and relay the message.
   B. Take the message, write it down, and tape it to her locker so that she will see it before leaving work.
   C. Page Nurse Kelly and tell her to come to the nurses' station.
   D. Page Nurse Kelly to the phone.

CHECK-OUT ACTIVITIES

The statement below explains the activities you must be able to complete in order to finish this module. After you go through the activities, your evaluator will rate your performance using the Evaluator's Final Checklist, INITIATING AND RESPONDING TO INTERCOM COMMUNICATIONS.

You will be given situations to use the intercom; answer the intercom twice.

INITIATING AND RESPONDING TO INTERCOM COMMUNICATIONS

Student _____

Date _____

Evaluator's Final Checklist

Check the student's performance in the following elements of initiating and responding to intercom communications.

Place an X in the appropriate box indicating not accomplished, partially accomplished, or fully accomplished. If, because of special circumstances, the item was impossible to complete, place an X in the "Not Applicable" box.

Performance Level: All items must receive a rating of FULLY ACCOMPLISHED (or Not Applicable). If any items are rated Not Accomplished or Partially Accomplished, the student and evaluator will discuss this and decide which learning activities must be repeated.

	Student Performance			
	Not Applicable	Not Accomplished	Partially Accomplished	Fully Accomplished
When initiating and responding to intercom communications, the student:				
Answered promptly and distinctly so that the message was heard in appropriate locations.	[ ]	[ ]	[ ]	[ ]

STUDENT SELF-CHECK KEY

Intercom Communication

1. C
2. D
3. B
4. B